

META THEORY METAPHORS AND PHENOMENOLOGY; TOWARDS AN INTERPRETIVIST ACCOUNT OF MARKETING PLANNING PRACTICE

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ABSTRACT

In the context of a general argument suggesting that there should be more phenomenological based research into the practice of marketing management, this paper indicates that a useful tool to assist the interpretivist researcher in the development of subsequent theory is the metaphor. Whilst it is recognised that much marketing literature is replete with metaphors, existing ones in use reflect the dominance of a meta theoretical approach. The latter postulates general systemic laws of marketing, which are held to exist irrespective of social context and individual conceptions of marketing. Metaphors like the 'product life cycle' are seen to be representative of this general theory. Instead, it is argued that researchers should uncover the individual metaphors that marketing managers use, ones which frame the latter's understanding and direct practice. It is suggested that the result could be the development of new practically based theories of marketing. These could be shared through the mechanisms of the metaphor, the latter acting as a symbolic device drawing together socially defined knowledge and individually created meaning.

INTRODUCTION: PHENOMENOLOGY AND THE USE OF METAPHORS

In the study of consumers, it has been recognised for some time that the use of phenomenology as a research methodology provides a range of important insights into human meaning and action which positivist approaches find very difficult to capture (O Guinn and Faber 1989; Hirschman 1986; Thompson et al 1989). With regard to marketing management, the case is different, with relatively little research emanating from this perspective, see Kent (1986;1998). More recently, in some of the marketing management and strategy literature, there have been arguments put forward suggesting that more research needs to be carried out using a phenomenological framework (Robson and Rowe 1997). This approach enables theory to be developed from the practitioner perspective, in contrast to the general positivist underpinnings of marketing which currently dominate the literature. Laurent and Pras (1999), argue that marketing academics need to get closer to real successful companies and to find out what is really 'going on' in actual marketing settings. Given this context, it is argued that phenomenology can make an important contribution to our understanding of marketing practice (Ardley 1994).

It is advocated here that there should be more of a qualitative inductive approach to research into marketing. The emphasis needs to be on theory development, not theory testing and a starting point for this is phenomenology. Whilst the general approach of the latter can provide insights into the life worlds of participants in a research study, (Kvale 1996), what is also needed are theoretical devices which will enable us to develop a structured analysis of individual interpretations of reality (Prange 1999). To facilitate this process, an important device that could be utilised in any subsequent analysis of research is the metaphor. Here, an attempt will be made to examine the value and contribution of metaphors in research, as it is

argued that they provide substantial potential for theory development in an interpretative investigation (Clegg and Grey 1996; Prange 1999).

In broad terms, a metaphor is a statement maintaining that two phenomena have certain common properties. Cudden (1991 p542) refers to a metaphor as "a figure of speech in which one thing is described in terms of another." Stern (1988), points out that metaphors are a specialised use of connotative figurative language, involving a comparison, in which an analogy is used to make a statement and hence convey an idea. In a metaphor one thing is said to be another, which is literally impossible, but which is imaginatively suggestive. Stern (1988), argues that the latter is expressed by the syntactic pattern *x is y*. As an example Morgan, (1986), suggests that when we say that a man is like a lion, then we are using the image of the lion to draw attention to the lion like characteristics of the man. On closer scrutiny, it is clear that metaphors permeate not only everyday life, but social science writing as well, when we realise for example that terms like 'theory building' are widely used in the literature (Kvale 1996).

Stern (1988), highlights the fact that the business community regularly creates metaphors to describe events and processes. Corporate takeovers are explained not only in allegorical terms but in medieval ones as well, when 'white knights' battle 'hostile raiders' for control of an organisation. For Tsoukas (1991), metaphors involve the transfer of information from what he calls a relatively familiar source domain to a new and relatively unknown target domain. Lakoff (1987) postulates that people can only understand abstract notions by mapping them on to more concrete ones. Importantly, as Morgan (1986) has noted, metaphors frame our terms of understanding in a distinctive way and their usage implies a way of seeing and a way of thinking about our world.

Metaphors are both descriptive and generative. They can name a situation and perhaps more importantly they can frame it and set the problem. Language is extremely important here, because the way individuals talk about the world has a great deal to do with the way in which the world is understood and acted upon (Dunford and Palmer 1996). Metaphors matter, because they can profoundly affect action. A key question to ask is here and one which could be pursued in a research programme, is what are the metaphors that marketing managers work with and how do they influence subsequent and on going practice? Metaphors can provide a central role in defining action as necessary and correct for managers in a given context. Knowing is always context dependent Chia (1996); Heritage (1984). Importantly, metaphors can encourage and provide different ways of thinking, enabling organisational members to focus on, explain and influence different aspects of the complex reality of organisations (Tsoukas 1991).

Metaphors can be used to convey meanings. A good example of this is Morgan (1986), who presents his analysis of organisations in terms of a wide variety of different types of metaphor. The organisation is presented in metaphorical terms as a machine, as an organism as a brain, as a culture, and as a political system, as a psychic cave as flux and transformation and finally as an instrument of domination. What the metaphor achieves is to show the importance of language in organisation settings and to see the same situation from multiple perspectives. In general terms, metaphors can reflect the diverse ways in which organisational members actors interpret and act in the world and this phenomenological strand is one which could be pursued in any research which attempts to understand the reality of marketing management.

METAPHORS AND MARKETING

In marketing, there is no doubt that metaphors are used extensively. Indeed at the very heart of marketing lies a key metaphor, the marketing mix, where practitioners as Brown (1995) points out, are expected to act as if they are preparing a meal from a mix of ingredients. Brown (1994) has used metaphor in his own writing, when he made a post modern attempt to meld marketing with cinema. A substantial amount of marketing language is actually metaphorical in nature, as O'Malley and Tynan (1999) indicate. It is argued that products experience changing types of growth and this is captured in the notion of a product life cycle. Customers too can also be represented metaphorically, as 'segments'. Brown and Turley (1997), see the marketer as a tourist, albeit in post modern form. O'Malley and Tynan (1999 p592), also draw out attention to the relationship metaphor which is widely used in marketing. For them, the relationship metaphor has,

" allowed us to appropriate the values of interpersonal relationships and to borrow their theoretical and conceptual frameworks in order to understand commercial exchange."

Hunt and Menon (1995), carried out an extensive review of metaphor usage in the context of competitive strategy. They identify among other things, marketing strategy as warfare, as marriage and as a game. Tynan (1997) also offers us a review of one of these areas, where the marriage analogy is used by marketing authors. In this case, marketers are asked to treat long standing relationships with key customers as a 'marriage'. Tynan (1997) points out that whilst some marriages and views of marriage see them as being freely entered into and likely to last a

lifetime, this particular metaphor is problematic when transferred to the target domain, because relations between the sexes can also be based on factors like stalking and rape. For Tynan (1997), the marriage analogy has outlived its usefulness and is detrimental to the conceptualisation of the relationship marketing paradigm.

More fundamentally, Arndt (1985) points out that metaphors are the basis of many of our paradigmatic perspectives in marketing. For Arndt (1985), large parts of human behaviour can be interpreted as attempts to make sense of the world by developing concepts about the environment. Meaning is thus provided to us through language, art, symbols and myths, via subjective processes. Words and names become tools for comprehending what is out in the world to be shared with others. Metaphors for Arndt (1985) help researchers to view the world through concepts, language and images, which focus and filter that which is being studied. Arndt (1985) gives examples of important metaphors in a range of paradigm groups, which include the 'victimised consumer' and 'spaceship earth'. The former draws our attention to disadvantaged consumer groups and the latter emphasises the environmental responsibilities of marketing.

For Zaltman (1996), metaphors are seen as central to cognition, where one thing is represented in terms of another. Metaphors are a way of creating and shaping thought. He advocates research into consumer behaviour using the Zaltman Metaphor Elicitation Technique, (Zaltman 1996), which enables close attention to be paid to the metaphors customers use. This means that the researcher can learn more about the latter's thoughts and feelings, important information that can be used for product and strategy development in marketing. Also within the context of the marketing organisation, McWilliam and Dumas (1997) advocate the use of

metaphors in brand development. Here, cross functional teams can be brought together and asked to construct metaphors which they believe typify the essence of the brand, an essence which can then be communicated to customers. For McWilliam and Dumas (1997), metaphors become brand tools which add value. In general terms, it is obvious that the use of metaphors is widespread. They are present not just in academic texts but permeate key aspects of people's daily lives. For Lakoff and Johnson (1980), metaphors are what we live by.

METAPHORS, META THEORY AND MARKETING PLANNING

A reason why metaphors are seen as particularly relevant to this interpretivist study resides in the nature of current marketing theory. If we consider the nature of this theory, then it becomes clearer as to why the use of metaphors can appear to be liberating. In terms of the current dominant marketing paradigm, a meta theoretical position is adopted, positing an objective world that is amenable to conventional marketing planning techniques, about which valid judgements can be made (Anderson 1983). Within this perspective, the marketing planner and the researcher have the task of developing knowledge which represents this external world through a range of rational tools and planning systems. In philosophy of science terminology this is articulated as a realist ontology and a positivist epistemology. In this framework, it is assumed that marketing relations have a systemic character, and a concrete and real existence independent of the observer. What this allegedly produces is regularities in marketing behaviour (Arndt 1985). As a consequence, the knowledge of marketing and marketing planning that we hold is bounded. This means that it is capable of being itemised, and operates according to definite, discoverable principles.

As a consequence, the notion of a meta theory in marketing evokes a situation where a normative prescriptive approach is advocated. This is very evident in the way in which much marketing planning theory is presented, where knowledge is managed as a sequence of planning processes that are embodied in a range of strategic tools. There is one unifying theory of marketing and one unifying theory of marketing planning Kotler (2000); McDonald (1999). The world is viewed through the functionalist paradigm, with its constituent parts as clockwork mechanisms all working together under a range of immutable laws (Arndt 1985). In this sense, marketing planning is about understanding how the marketing world works and then finding the one right way to cope with any marketing problems. To solve the problem requires use of the right methodology, which might be, for example, the carrying out of a marketing audit to be followed by the setting of marketing objectives. Much of it is about making the right connections between the parts of the marketing planning system. What much of this assumes is that marketing planning issues are hidden, existing independently of human consciousness.

Though metaphors are very evident in much current marketing thinking, they are overwhelmingly representative of this meta theoretical orientation. Most of the marketing metaphors that are in widespread use are about overarching systemic qualities. They are driven by deductive logic, being concerned with prescription and not with an understanding of individual conceptions of marketing. The notion of a product life cycle, a wheel of retailing, a channel of distribution, marketing warfare, and a marketing mix, can all be judged as being representative of objective marketing 'laws'. These it is suggested, are not metaphors which are rooted within the practices of most marketing managers, but within prescriptive theory. The latter effectively removes individual agency from any accounts of reality. The consequences are that the provision and dissemination of practical knowledge about marketing decision making is being neglected, as O'Driscoll and

Murray (1998) point out. What research could aim to show is that metaphors are deeply widely and differently embedded in marketing managers perceptions and they are not of the dominant 'meta' variety. Instead, it is argued that they reflect the pluralistic character of reality. The latter is readily expressible through a variety of metaphorical symbols, where no real world exists independent of human mental activity and language (Moustakas 1994).

A central argument here is that metaphors can be a useful research tool if they emanate from an epistemological position which points out that meanings are not given, but constructed by participants as they go about their everyday organisational activities (Prange 1999). The problem is that for much current marketing theory, the metaphors are infact given. A focus instead on the metaphors actually used by organisational members, can give the researcher insights into what previously might have been hidden feelings and perceptions about marketing and marketing planning activity. The use of these dominant metaphors, as a mode of analysis, expressed by actors in given contexts, could reveal a great deal about the thought processes operating at any one time, as used by marketing managers.

Importantly, metaphors can reveal thoughts and perceptions that are difficult to articulate (Cazal and Inns 1998). These perhaps are intuitive, emergent practices and understandings, relating to the use of tacit knowledge in organisations and marketing management Baumard (1999); Hackley (1999). For Broekstra (1996 p64),

"tacit knowledge includes subjective insights, intuition, experience, emotions and the use of metaphors."

Here, the utility of metaphorical analysis based within a social constructivist perspective should enable the researcher to gain access to the meanings given to events by practitioners. The general approach discussed here reflects an underlying commitment to an interpretivist perspective (Prange 1999). The social world is being continually constituted by human beings through linguistic and symbolic means and metaphors are not just literary illustrations, but can provide a basic form of experience through which people understand the world. In drawing attention to the importance of having alternative conceptions of reality (Morgan 1986), metaphors can be used to highlight the limits of traditional prescriptive theory and not to support it, as current mainstream marketing metaphors appear to do.

METAPHORS AND RESEARCH

Clegg and Grey (1996) defend the use of social constructivist metaphors in research. They reject the notion of objective social reality found in much prescriptive theory and argue for an interpreted order in data. A key researcher who used metaphor from a phenomenological perspective is Goffman (1959). His first research strategy was to use extended metaphors, normally those of life as theatre and as a game. He did not see metaphors as just appendages to research studies, but as a particular form of map to the social world. Thus the ordinary seeming organisation of corporate offices can be reconsidered as carefully constructed 'front' and 'backstages' (Manning 1992). Goffman used metaphors as conceptual models exploiting our ability to extend their use to a range of settings. His metaphor 'life is a confidence trick' was shown to apply on all manner of

occasions. For Goffman (1959), the dramaturgical metaphor is strong. We play roles, mystify our performances, take part in team behaviour and display skill at impression management. This is a dimension of marketing planning management which much current theory fails to articulate, but which is highly significant, nevertheless.

What metaphors also enable us to do is to develop a view of reality which takes full account of social structure and the subjective dimension of experience. To deal with this issue in more detail, it can be pointed out that in the study of organisations, marketing and society, researchers have to contend not only with individual perceptions of reality, but with objective institutions and structures, which people reproduce and transform (Berger and Luckman 1967). There is a dualistic relationship between agency and structure Giddens (1973); Boden (1994). There is no independently existing pure objective or subjective world, as this denies the relationship between the outer environment and the personal self (Inns and Jones 1996). For Berger and Luckman (1967), there takes place a subjective interpretation of the social stock of knowledge. Metaphors, as language phenomenon, are a very important part of this stock of knowledge. Phenomenology, by employing the metaphor as a research tool, can begin to overcome the problem raised by May (1997). He, with others, suggests that phenomenology cannot adequately take account of social structure. It can be argued however, that social constructivist metaphors are basic to how individuals make sense of events in a collective and individual way (Cazal and Inns 1998). Metaphors become a point of contact between socially defined meanings and individually created meanings and they show how people use,

" relatively stable collective forms for the making and expressing of diverse and

possibly idiosyncratic and private meanings." (Rapport 1994 p24).

As Inns and Jones (1996) indicate, the metaphor becomes central to showing how individuals ascribe meaning in the world, by working on the basis of similarities. In the context of the agency structure debate, outlined here, the metaphor can direct our attention to the interaction that occurs between an individual's conceptual framework and the external world of physical things and social structures. Clearly, marketing managers are also likely to ascribe meanings through metaphor. The task of the researcher becomes one of then determining how collectively understood terms relate to the specific situation of individual managers. Commonly understood terms used by marketing managers could include descriptions of companies as 'rudderless ships', management practice as 'more black art than science' and research into the market as 'keeping our fingers on the pulse'. Whilst we may recognise these metaphors, only in depth research will reveal to what extent they are embedded in local meaning and understanding. As Hampden Turner's (1990) research indicates, metaphors can unravel the mental charts used by organisational members in the management of meaning. Furthermore, if several metaphors are in use in a research study, then this should not be seen as a problem. Inns and Jones (1996), point out that partiality is advantageous, as having a variety of metaphorical perspectives avoids the problem of reductionist understandings, enabling the researcher to build up a complete picture of the complexity of a situation.

In a given context, metaphors can be seen as being useful in terms of analysing and imposing structure on research material, see Cazal and Inns (1998); Tsoukas (1991); Miles and Huberman (1994); Kvale (1996). With regard to the latter, he points out a studies main aspects may be more easily understood and remembered

when it is worked up into clear metaphors. Miles and Huberman (1994), recommend the use of metaphors in qualitative studies suggesting that firstly, they can be viewed as data reducing devices, where several instances can be taken and one generality made of them. In this case, the metaphor represents a powerful tool for the creation of themes. The metaphor can be used to compactly convey many connotations and ideas to the reader of the research. Miles and Huberman (1994), indicate that metaphors are excellent decentering devices. The researcher has to step back to see beyond the existing conceptual models in order to ask what is really going on in a particular context. Importantly for Miles and Huberman (1994), the metaphor will not let the researcher simply describe or denote a phenomenon, but will make them move up to a more analytical level.

An example illustrates the latter point. In a school improvement study Miles and Huberman (1994), found that a remedial reading room felt like an oasis for the students sent there. The oasis metaphor pulls together separate bits of information; it points to a larger school environment that is resource thin, like a desert. Some resources are abundant as in the remedial room, like water in an oasis. This thinking is reflective of Weick's (1979) thoughts on the use of metaphors. He points out that what matters most in metaphorisation is less the individual idea that would be simply transferred, but the theoretical pattern it firstly supports amongst others and then activates within a different framework. This occurs through interaction with the objects of concern. Importantly, the unit for explanation is located not in an isolated image and its transposition, but in a complex collection of meaning. In this context, metaphors offer great promise as a focus for study.

METAPHORS, MARKETING AND THEORY GENERATION; A PHENOMENOLOGICAL PERSPECTIVE

In any research study, theory explication has an important role to play. As Miles and Huberman (1994 p90) point out, the researcher wants..." to understand and to explain coherently why things occur as they do." The implication of this is that theory should be built out of the material that has been researched. A key question to ask here is what actually makes a good theory and how metaphors can contribute to it. Webb (1961) suggests that good theories exhibit knowledge, scepticism and generalisability. Metaphors, if based within an interpretivist framework, rate highly on the first criteria, because they are saturated by closeness to participants. With regard to scepticism, or what Webb (1961) calls dissatisfaction, this is always likely to be the case anyway with qualitative studies, where different social contexts and meanings might result in different types of findings, given the same research topic.

It can be argued that in all three areas traditional marketing theory does not meet Webb's criteria. It fails to obtain all possible knowledge about individual circumstances, instead preferring to lay down prescriptive guidelines as to how organisational members should implement marketing. Certainly, little scepticism seems to exist regarding its purported effectiveness. Additionally, it is commonly regarded as being generalisable, despite the fact that marketing is different in one context to another (Gummesson 1999). Even those committed to the traditional prescriptive school of marketing are now beginning to recognise this important point (Simkin (2000). Despite this, a great deal of research into marketing planning is carried out and evaluated according to the way in which it is supposed to conform to an objective external reality, see for example Greenley and Bayus

(1993). There is an overriding concern with generalisability, where the latter becomes the only way to label something as meaningful theory (Weick 1989).

For Miner (1984), any failure to generate generalisability or any theory which is non cumulative in nature, is seen as threatening and hence not useful. If it is not generalisable, then it is not valid. Interpretivist approaches to theory development question this perspective, as social situations and actions are contingently located. For Prange (1999), we need to broaden our range of ontological and epistemological assumptions about what 'good' theory is. It is too easily assumed that the theory which surrounds the dominant view of marketing planning is 'good'. For Weick, (1989 p517) the latter is ...

" a plausible theory...interesting rather than obvious, irrelevant or absurd, obvious in novel ways, a source of unexpected connections, high in narrative rationality, aesthetically pleasing or correspondent with presumed realities."

Interpretivist based metaphors as theory meet the presumed realities of practitioners and are plausible because they represent the meanings actors use and work with. Metaphors can be high in narrative rationality because they seek to explain action and meaning in detail. Metaphors may represent unexpected connections and this might appear in an aesthetically pleasing way, dependent of course on audience perception. The theory put forward based on an organising metaphor may well be novel, in that it will reflect the nature of marketing reality, unburdened by a need to conform to traditional thinking. In contrast, it can be argued that conventional marketing planning theory struggles on all of Weick's criteria. Metaphors can make other contributions as well. Astley (1984), points out that in a business setting managers need to interpret the significance of their own

actions as well as those of others. It can be argued that metaphors can help to achieve this, where the everyday thinking of managers is utilised in the construction of theory, rather than in the prescriptive tenets of conventional marketing science.

Theories guide managers thinking. They can tell the latter what to expect where to look, what to ignore, what actions are feasible and what values to hold (Prange 1999). Additionally, the latter also points out that metaphors can act as lenses, enabling researchers to see reality more clearly. Theories also strongly influence retrospective interpretations; conventional marketing planning theory depicts what the practitioner should have done in any given situation. Marketing planning's meta theoretical approach also tells the practitioner how to act in the here and now. Alternatively, it is argued that metaphor inspired theory should be used, based on a phenomenological perspective, enabling the researcher to better understand the meanings and actions of individual marketing managers. The point is that the practitioner becomes the final arbiter of the degree to which a theories value is seen as authoritative. It can be argued that the metaphors used by individual marketing managers represent the basis of the theories which inform their practice.

Metaphors can be seen as a way to supply the raw material that if suitably processed, will yield new theories, revealing the limitations of traditional prescriptive approaches. (Cazal and Inns 1998). Brief and Dukerich's (1991) notion of 'practicality' in theory development supports the central contention here. They suggest that theory should act as an "idea generator" (Brief and Dukerich 1991 p341), making it possible for practitioners to view their worlds in ways they might not have done. Practicality is not about offering narrow 'useful' prescriptions, as is

the case with traditional marketing theory. For Brief and Dukerich (1991), the traditional approach to notions of usefulness in theory development has almost always been equated with the ability to explicate how something or some problem can be solved in an applied setting. In contrast, a practical theory is still 'useful', but more widely so. It can suggest courses of action, but is not an advocate of any one approach. Metaphors can guide analysis and explore solutions making use of a variety of perspectives. (Inns and Jones 1996).

Theory can be about offering managers ideas, and metaphors can do this by acting as symbolic devices, where meaning can be constantly derived from practical experience. To further our understanding of current marketing practice, we need to move beyond the prescriptive stance of conventional marketing meta theory. As Whetton (1989) points out, there is a case in theory development to distinguish between description and prescription. By describing and understanding at a deep level what key metaphors marketing managers think and work with, we may develop new knowledge of their life worlds. Insights can be communicated to others and metaphors can be utilised to describe experience and to gain a better understanding of what is 'going on'. Supported by Inns and Jones (1996), the central point here is that there exists a strong case for more phenomenologically based research programmes. The latter, using metaphors as theoretical and analytical devices, should enable us to open up the worlds of marketing managers, in a way that in the past, has never really been satisfactorily accomplished.

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